

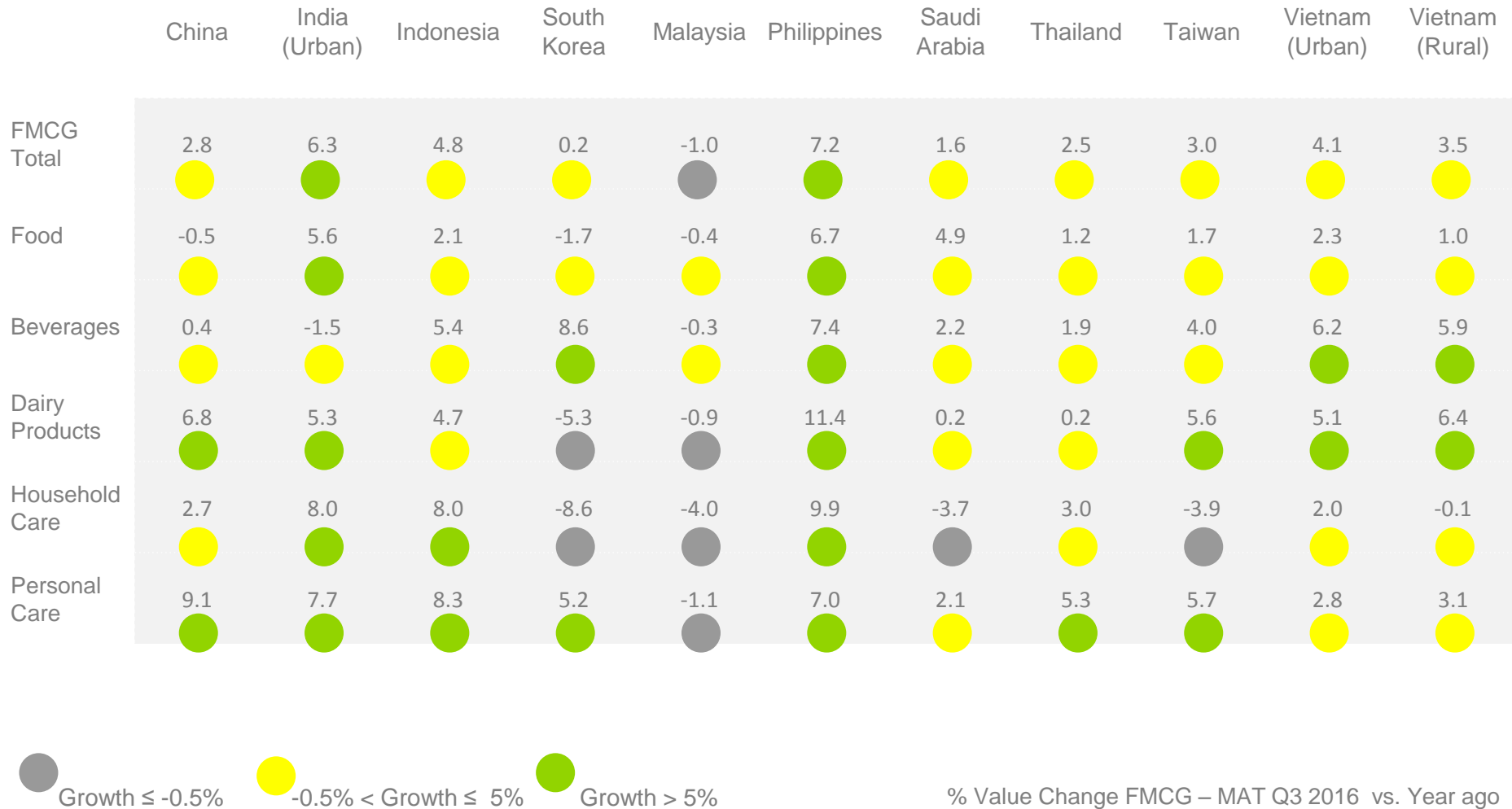
**KANTAR WORLD**PANEL

The background of the slide is a dense, repeating pattern of glowing red lanterns. The lanterns are arranged in vertical columns, creating a sense of depth and rhythm. They are illuminated from within, casting a warm, orange-red glow. The lanterns have a traditional design with a ribbed structure and a decorative top. The overall effect is a vibrant, textured background that fills the entire frame.

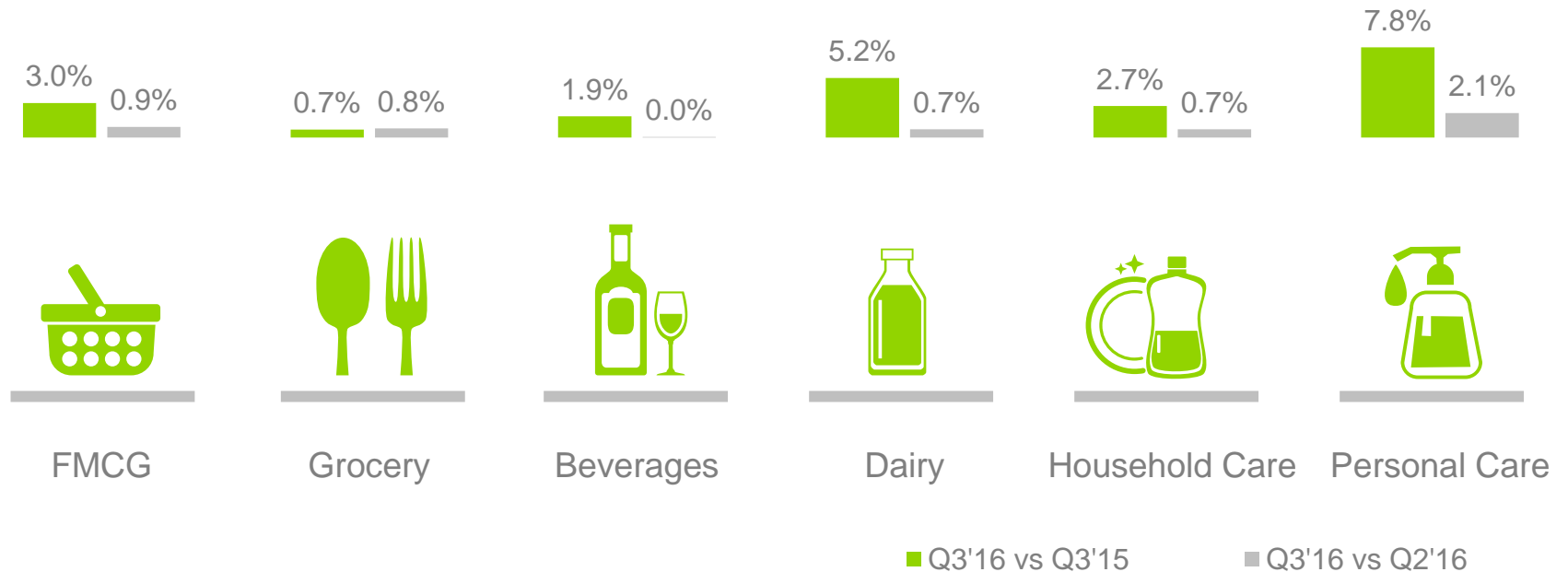
# Consumer Insights

ASIA Q3 2016

# Q3 2016 | SUMMARY ASIA



# FMCG GROWTH IN ASIA : YOY; QOQ



ASIA / MAT – VALUE SPEND GROWTH

# FMCG: growth driven by India, Indonesia, Vietnam and Philippines



ASIA / MAT Q3 2016 – Value Growth FMCG

■ Q3'16 v Q2'16

■ 2016 v YA

# FOOD: Philippines is star performer, more than doubling its growth from last year



ASIA / MAT Q3 2016 – Value Growth FOOD

■ Q3'16 v Q2'16

■ 2016 v YA

# BEVERAGES: Indonesia, Vietnam and Philippines performed better



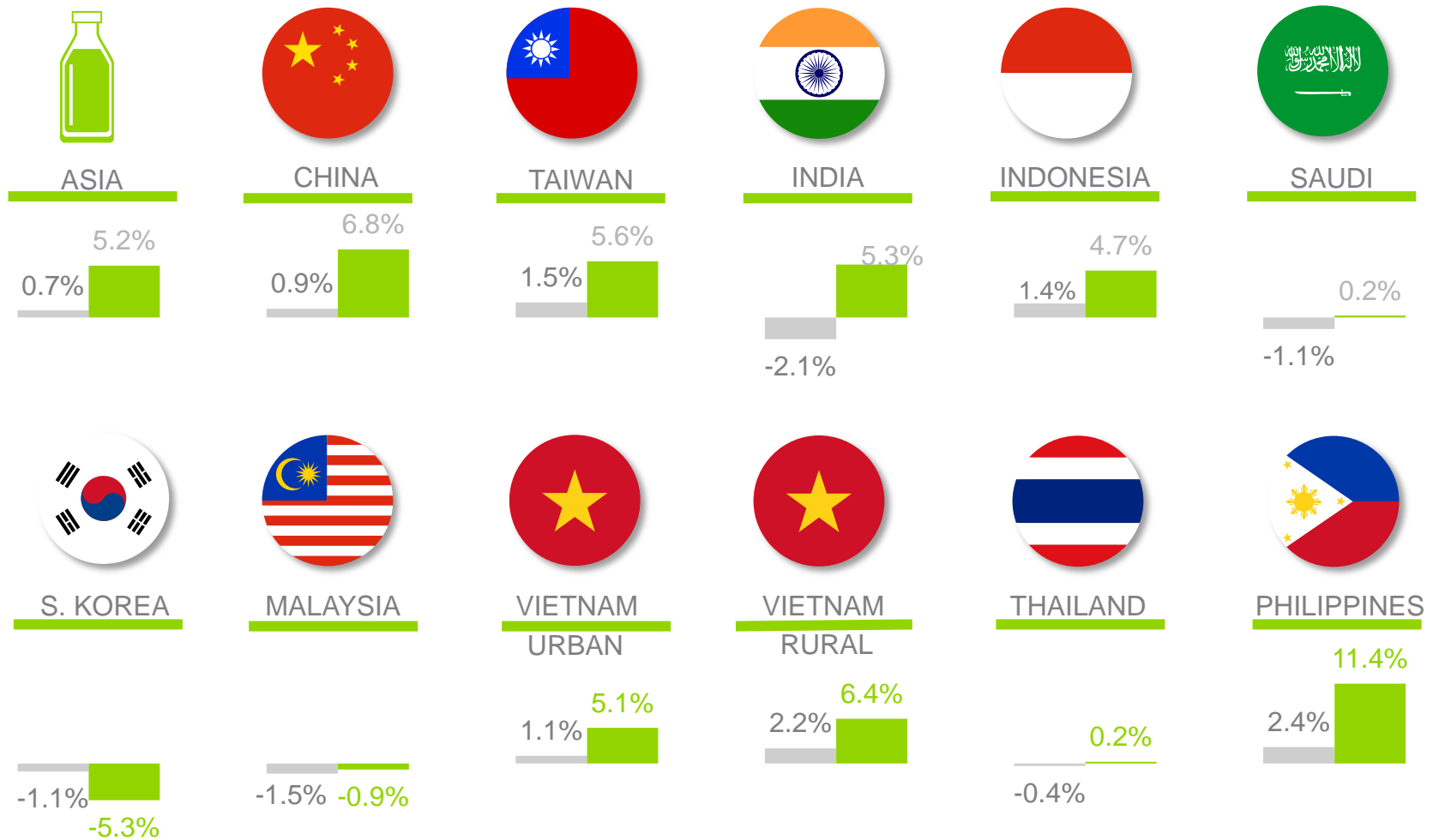
ASIA / MAT Q3 2016 – Value Growth BEVERAGES

■ Q3'16 v Q2'16

■ 2016 v YA



# DAIRY: China, Taiwan, India, Indonesia, Philippines experience strong growth



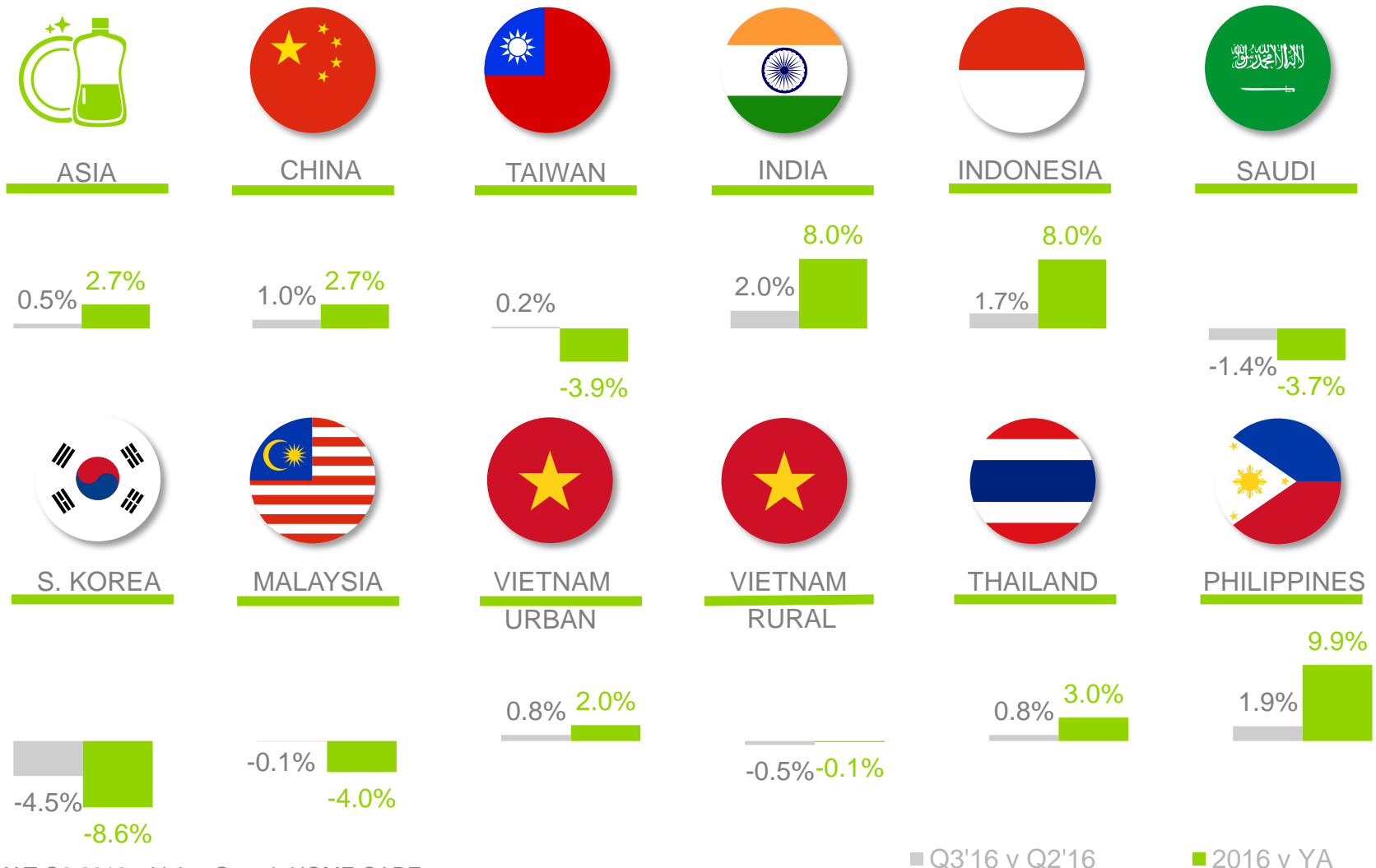
ASIA / MAT Q3 2016 – Value Growth DAIRY

■ Q3'16 v Q2'16

■ 2016 v YA



# HOUSEHOLD CARE: growth driven by India, Indonesia and Philippines



ASIA / MAT Q3 2016 – Value Growth HOME CARE

■ Q3'16 v Q2'16

■ 2016 v YA

# PERSONAL CARE: China registered strong growth, together with India, Indonesia, Korea, Thailand and Philippines



ASIA / MAT Q3 2016 – Value Growth PERSONAL CARE

■ Q3'16 v Q2'16

■ 2016 v YA

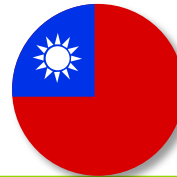


### CHINA

**#GrowthOpportunity** Lower tier cities offer more opportunities for brick and mortar stores

**#Beauty** Personal care grew fastest and the spending grew by 9.1% year on year

**#eGrowing** Leading online retailers like Tmall and JD are aggressively growing their shopper base



### TAIWAN

**#ModerateRecovery**

Confidence regained, Taiwan's consumers are increasing their shopping occasions from low point year ago

**#SugarFree&Color** Dairy leads the growth with notable contribution from Sugar-free Soy Milk. Color make up also surged with recent innovations

**#PXup** PX Mart outpace market growth contributed by the increase of traffic in food sector



### S. KOREA

**#BodyCare** Growth of body care market with the trend of diversification/premiumization/customization of body products

**#SeniorsOnlineUsage** Online shopping became basic channel across all ages with rapid penetration increase among seniors

**#DemandFreshness** More and more people seeking fresh food online. Same day delivery is key.



### THAILAND

#### **#EconomicImprovement**

Recovery remains fragile. Consumer confidence and Domestic consumption still fluctuates

**#CautiousShoppers** shopping less often & reducing # categories bought

**#TailoredStrategy** one approach no longer fits all - shopping habits between Urban vs. Rural HHs becoming more differentiated



### MALAYSIA

**#BigBaskets** Shoppers are still making fewer but larger trips, purchases in Provisions starting to slow

**#RecessionIsComing?** Many categories are in decline with Non-Alcohol Beverages being hit the most

**#Retailing** 99 Speedmart continuing its excellent performance in this market, growing by 15% in the market



### PHILIPPINES

**#LegenDairy** Dairy Products are growing fast, driven by Soy Milk, which has grown 19% in value

**#Sari2xPower** Sari-Sari Stores remain as the top channel, almost half of all purchases are done there

**#CerealKillsIt** Instant Cereal Beverages tops the list of fastest growing category, gaining new shoppers the most



### INDONESIA

**#StartingToShowRecovery** Total FMCG slowly showing recovery. Consumers started to spend and buy more, though still shop less frequent

**#BasicPriorities** Consumers are still prioritizing staple categories on top of their shopping lists.

**#LowInflation** Indonesia's inflation is on its lowest for the year, hitting a 6 year low in July'16



### VIETNAM

**#StillGrowing** Both Urban and Rural Vietnam still on a growth, with the help of Beverages and Dairy

**#StreetSmart** Street shops still holding its position, difficult for Hypers & Supers

**#HotStuff** Sweetened Condensed Milk, Drinking Yoghurt and Tonic food drink still able to attract new shoppers



### INDIA

**#CautiousSpending** Shoppers are observed to spend cautiously in the latest quarter

**#Aspirations** Rural shoppers are mirroring Urban shoppers in terms of spending

**#NaturalEssence** Herbal variants continues to gain salience in Skin Care, Face Wash and Hair Care category, the next big thing in Personal Care category



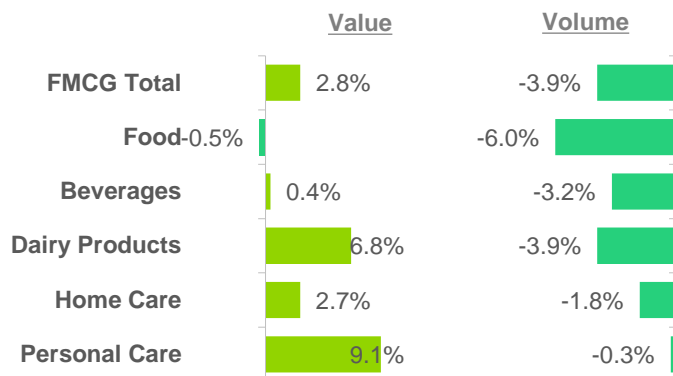
### SAUDI

**#Slowdown** FMCG continues to slowdown, led by home care sector.

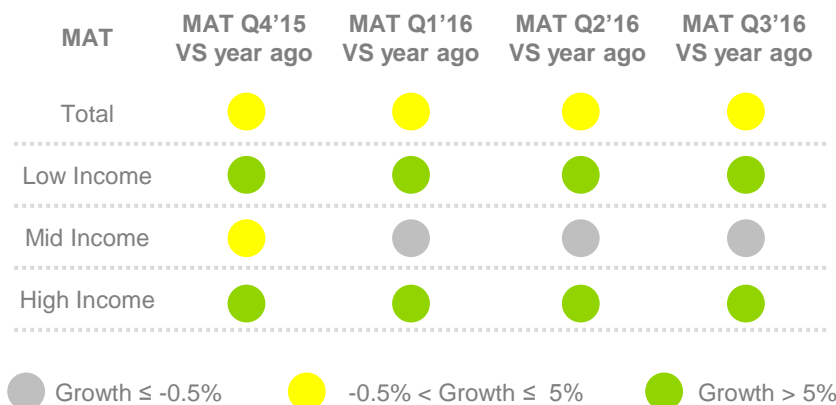
**#UpperClassFocus** FMCG spends among affluent class has improved. However there's a slow down on spending by lower SECs

**#CategoriesRising** Sliced bread, Bottled water, Body Deodorant, Dessert Mixes, and Spreads are having healthy growth

## BASKET TRENDS – Q3'16 vs Q3'15



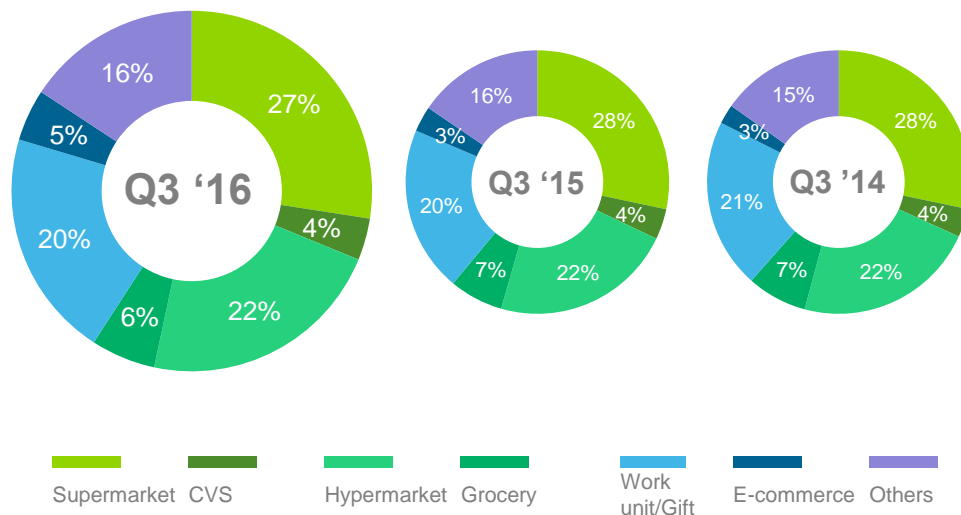
## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



## Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

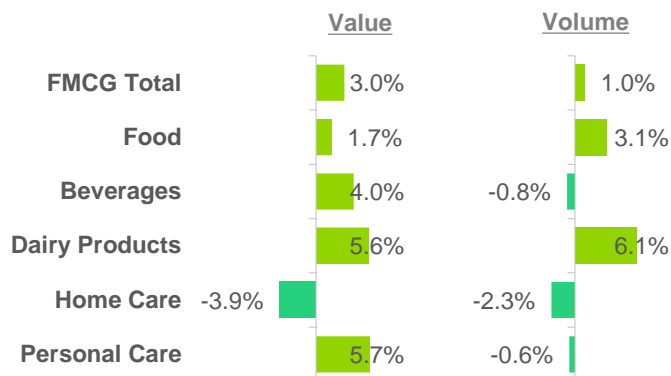
Value	Volume	Penetration
Mouthwash	Kitchen Rolls	Oyster Sauce
Kitchen Rolls	Butter	Packaged Water
Yoghurt	Oyster Sauce	Conditioner
Oyster Sauce	Mouthwash	Kitchen Rolls
Packaged Water	Curry	Cheese
Intimate Hygiene	Cheese	Curry
Cereals	Foreign Spirits	Frozen Food
Butter	Packaged Water	Mouthwash
Conditioner	Coffee	Facial Tissue
Skin Care	Frozen Food	Butter

## Channel Importance

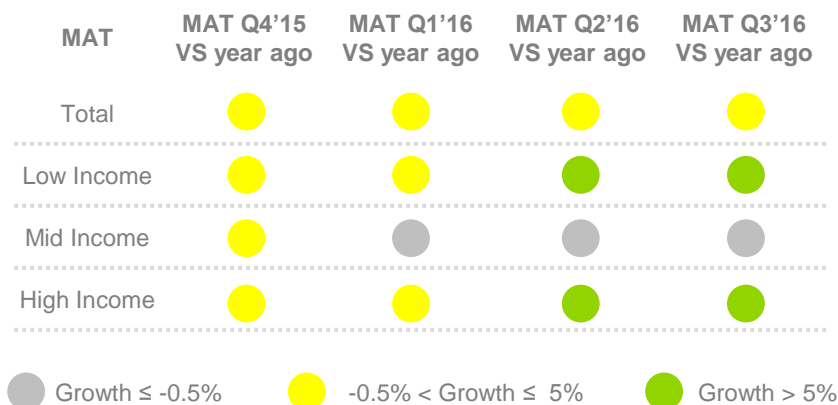




## BASKET TRENDS – Q3'16 vs Q3'15



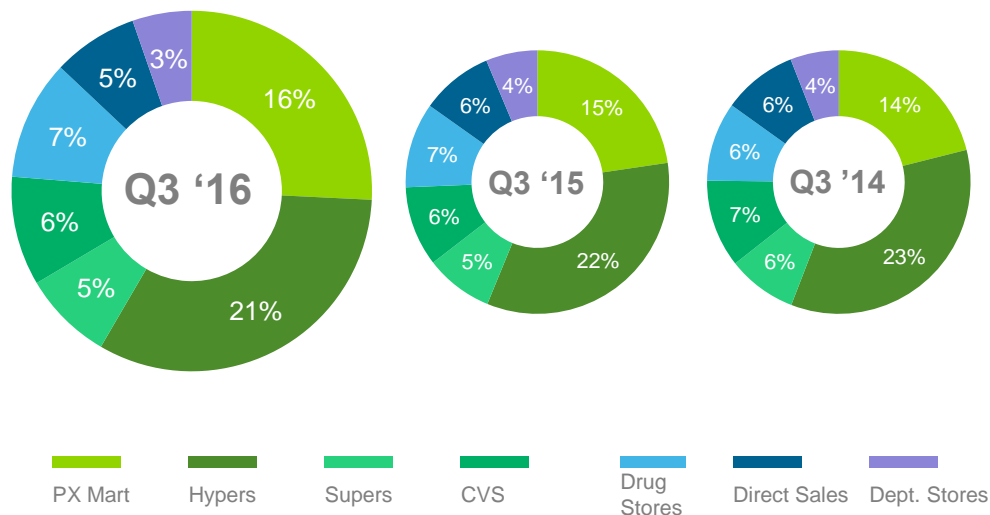
## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



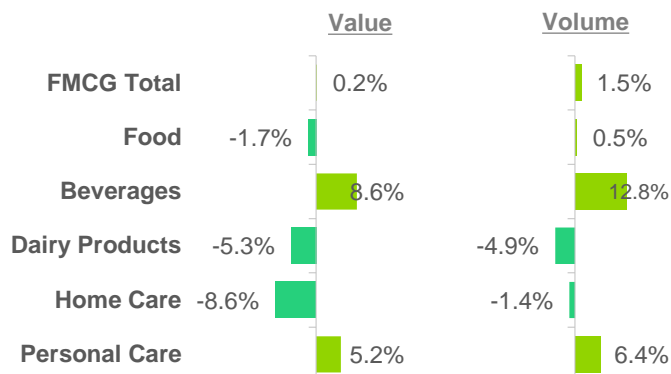
## Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

Value	Volume	Penetration
Adult Diapers	Cordials	Corn Snacks
Pet Food	Adult Diapers	Cordials
Cordials	Corn Snacks	Ground Coffee
Bird's Nest	Beer	Insecticides
RTE Breakfast	Birds Nest	Beer
Nail Polish	Toothbrush	Facial Mask
Chili Sauce	Cheese	Flour Snacks
Face Makeup	Insecticides	Cheese
Bar Soap	Flour Snacks	Vinegar
Insecticides	Breakfast Cereal	Tea

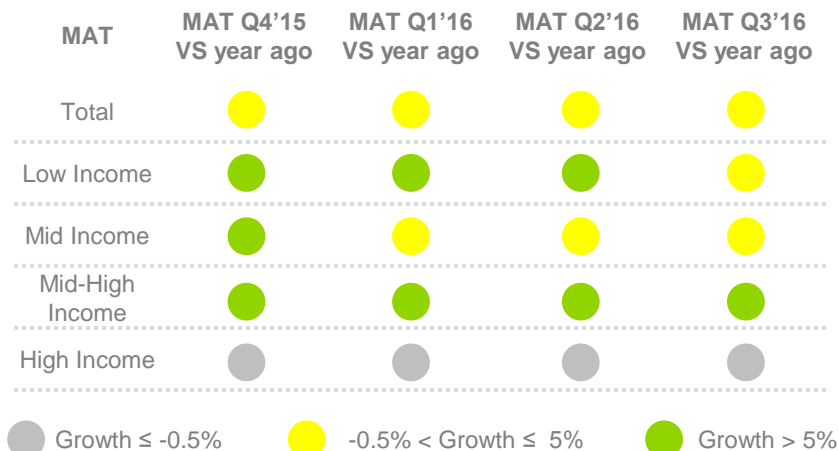
## Channel Importance



## BASKET TRENDS – Q3'16 vs Q3'15



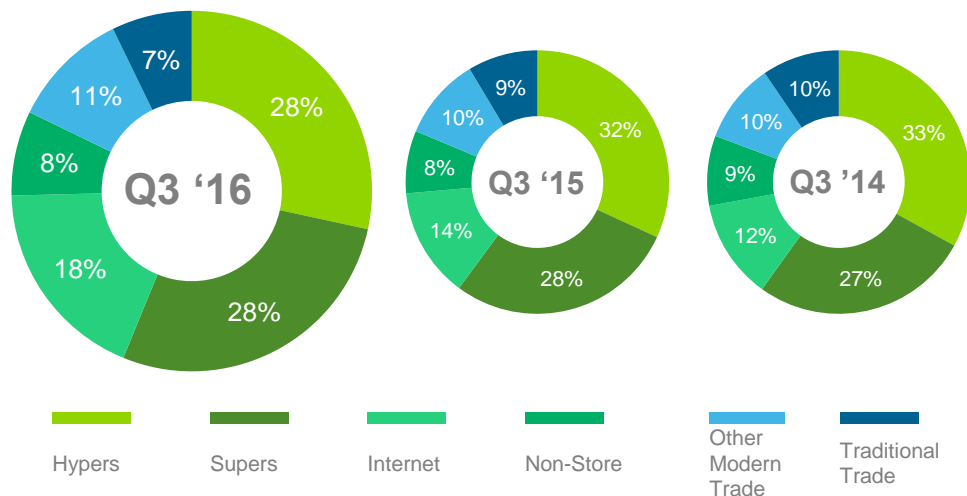
## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



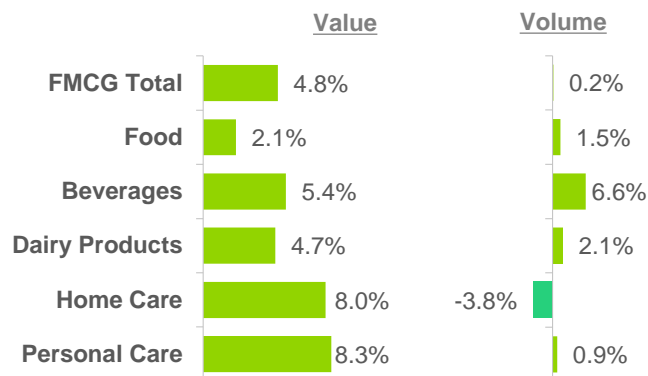
## Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

Value	Volume	Penetration
Bath Treatment	Bath Treatment	Retort
Grounded Coffee	Baby Food	Frozen Prepared Food
Baby Food	Yoghurt Powder	Facial Pack
Yoghurt Powder	Grounded Coffee	Processed Milk
Air Freshener	Facial Pack	Facial Cream
Hair Treatment	Pie/Custard	Kimchi
Eyebrow	Chocolate	Hair Treatment
Facial Pack	Air Freshener	Body Care
Retort	Hair Treatment	Lipstick
Foundation	M.Function Makeup	Water

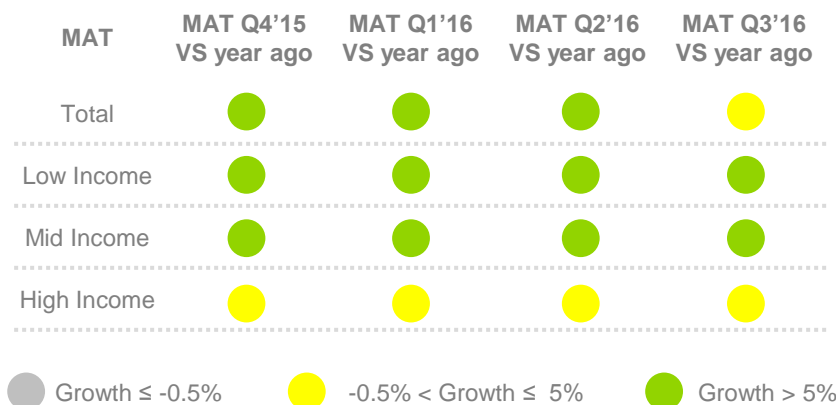
## Channel Importance



## BASKET TRENDS – Q3'16 vs Q3'15



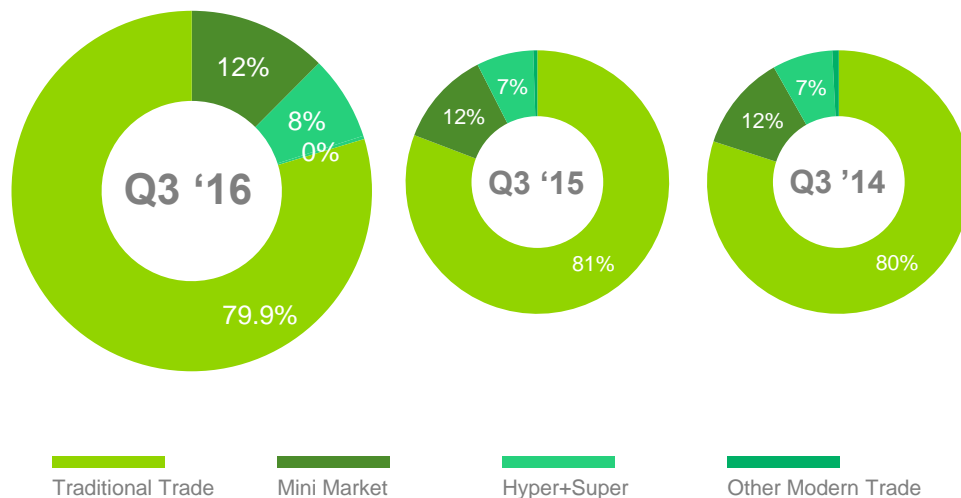
## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



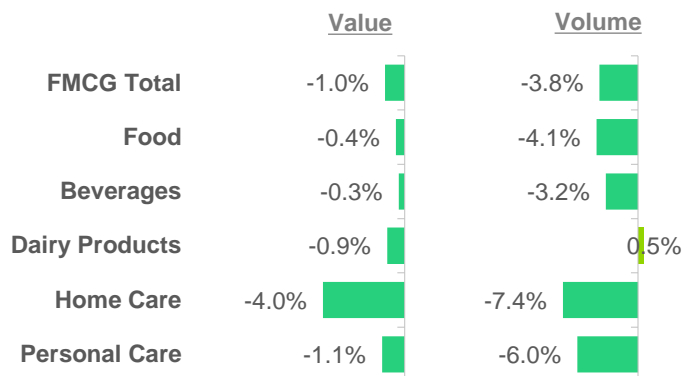
## Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

Value	Volume	Penetration
Clothes Stain Cleaner	Clothes Stain Cleaner	Clothes Stain Cleaner
Yoghurt Drink	Hair Colorant	Shower Gel
Mayonnaise	Yoghurt Drink	Mineral/Distilled Water
Tomato Sauce	Baby Cereal	Dish Wash
Baby Body Care	Tomato Sauce	Yoghurt Drink
Baby Cereal	Facial Tissue	Body Deo
Cold Cereals	Baby/Kids Diaper	Family Milk Powder
Peanut Butter	Sun Block	Baby Body Care
Hair Colorant	Eye Cosmetic	Snacks exc. Potato
Shower Gel	Cold Cereal	Ironing Softener

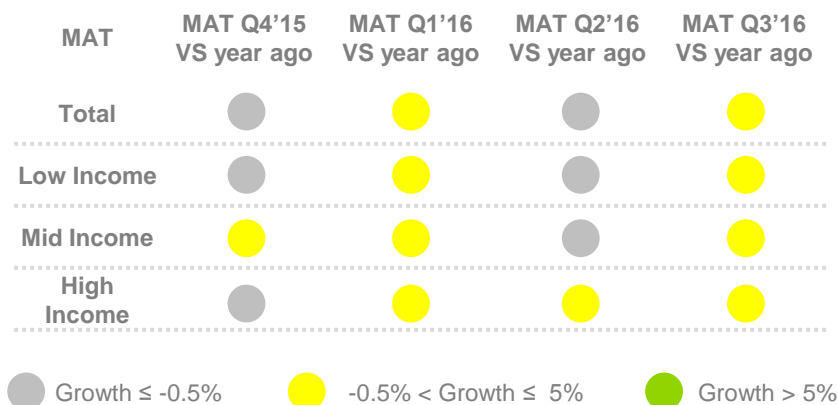
## Channel Importance



## BASKET TRENDS – Q3'16 vs Q3'15



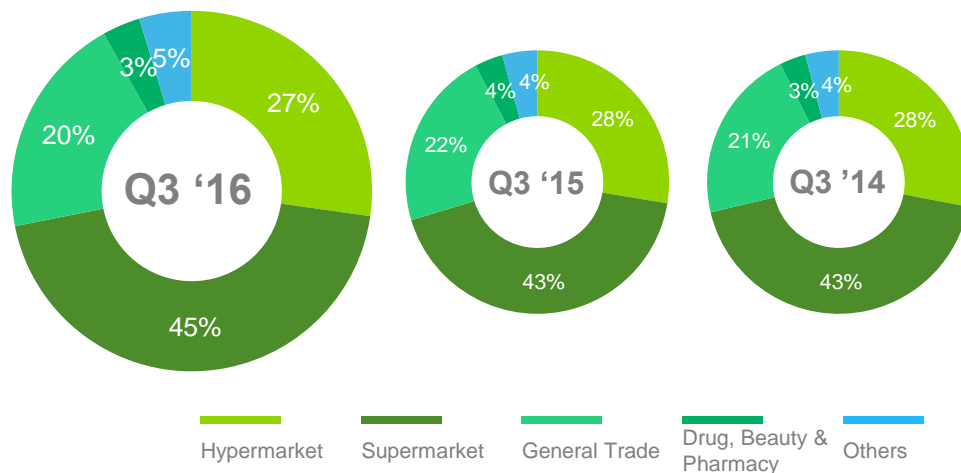
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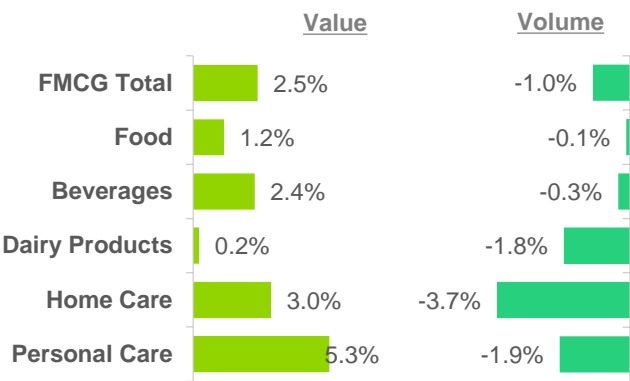
## Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

Value	Volume	Penetration
Lip Liners	Lip Liners	Choc/Nut Spread
Concealer	Concealer	Bouillon
Birds Nest	Drinking Water	Spaghetti
Spirits	RTD Coffee	One Step
Eye Shadow	Adult Diapers	Cordials
Dusting Powder	Choc/Nut Spread	Eggs
RTD Coffee	Cosmetic Brush On	Styling Aids
Adult Diapers	Birds Nest	Yoghurt Drink
Eye Brow Liner	Butter	Cheese
Disposable Razor	Cheese	Sugar

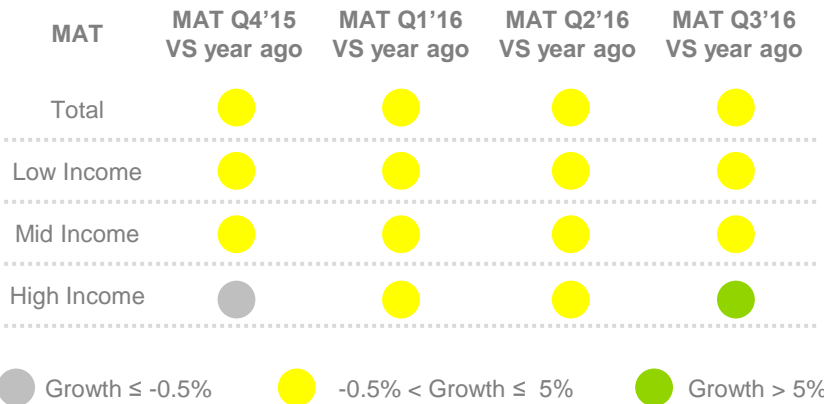
## Channel Importance



BASKET TRENDS – Q3'16 vs Q3'15



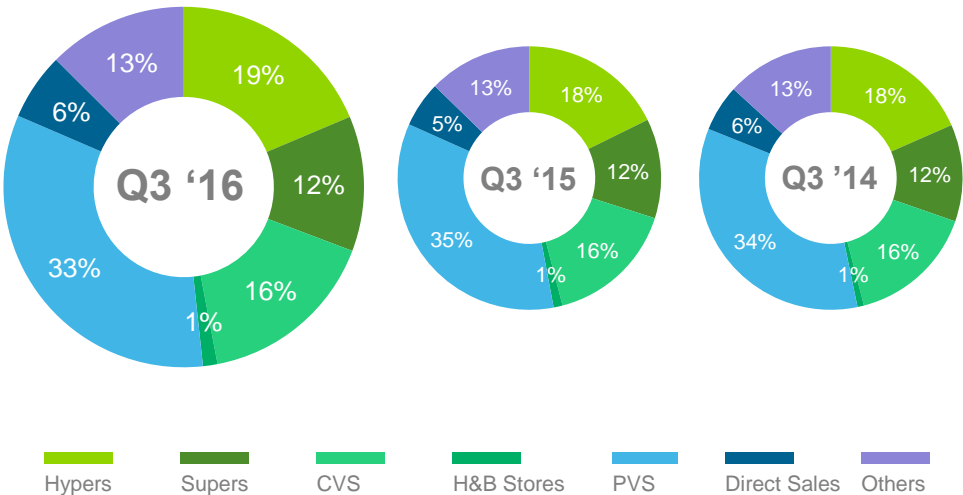
%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



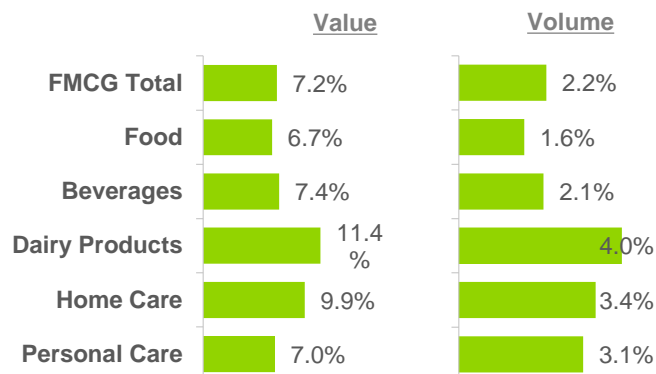
Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

Value	Volume	Penetration
Facial Tissue	Canned Fruit	Bottled Water
Canned Fruit	Bottled Water	Beer
Bottled Water	Facial Tissue	Facial Tissue
Beer	Canned Fish	Deo
Canned Fish	Sun Protection	Rice
RTD Coffee	Energy Drink	Toilet Tissue
Facial Cleanser	Canned Vegetables	RTD TFD
Baby Diaper	Cup Yoghurt	Essence of Chicken
Talcum Powder	Rice	Sun Protection
Deo	RTD Coffee	Cup Yoghurt

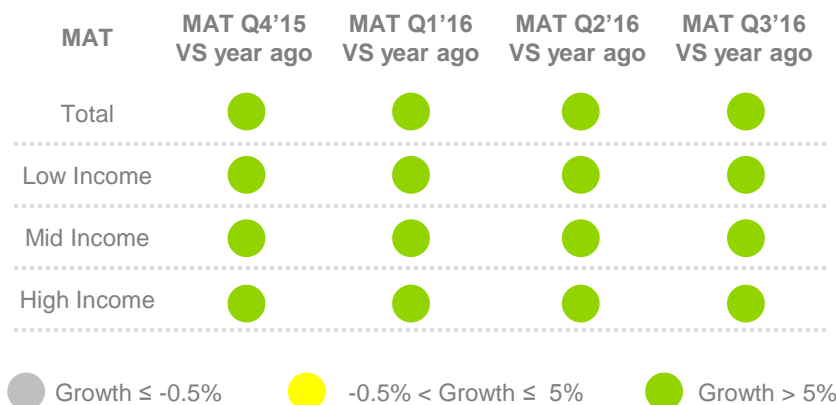
Channel Importance



## BASKET TRENDS – Q3'16 vs Q3'15



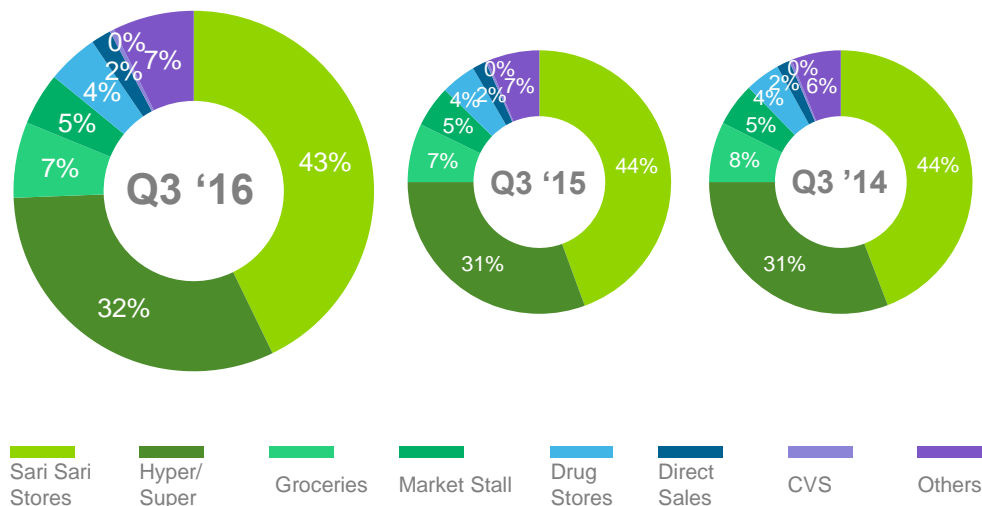
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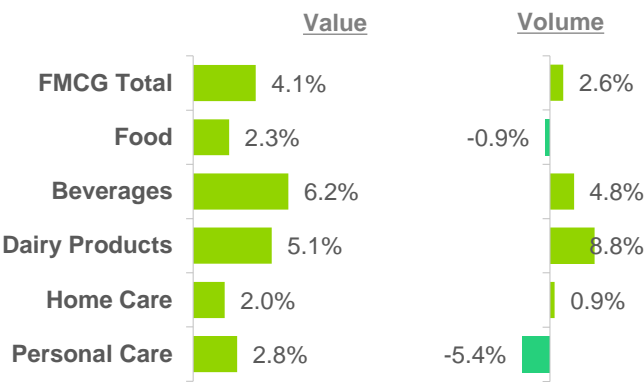
## Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

Value	Volume	Penetration
Liquid Detergents	RTD Coffee	Instant Cereal Bev.
RTD Coffee	Liquid Detergent	Liquid Detergent
Oyster Sauce	Oyster Sauce	Oyster Sauce
Liquid Soap	Multipurpose Cleaners	Toilet Bowl Cleaner
Instant Pasta	Meal Mixes	Deep Fry Coating
Feminine Wash	Hair Colorant	Wet Tissues
Tea Bags/Loose Tea	Instant Pasta	Scouring Pads
Rhum	Sandwich/Liver Spread	RTD Coffee
Yoghurt Drink	Soy Milk	RTD Breakf. Cereal
Toilet Bowl Cleaner	Cubes/Buillon	Mayonnaise

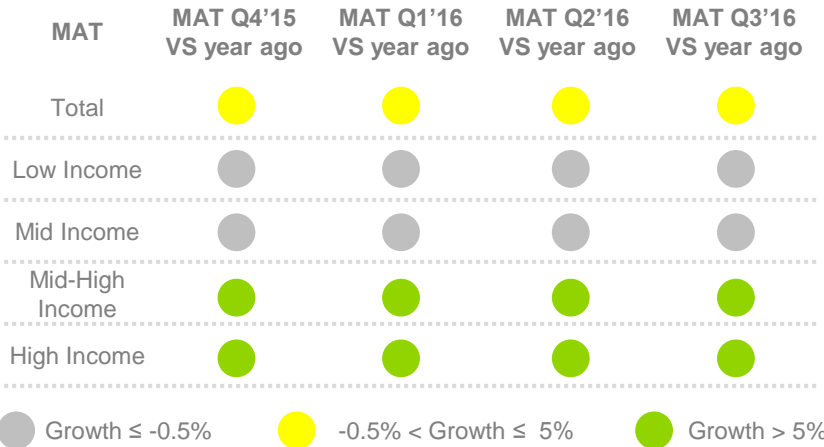
## Channel Importance



BASKET TRENDS – Q3'16 vs Q3'15



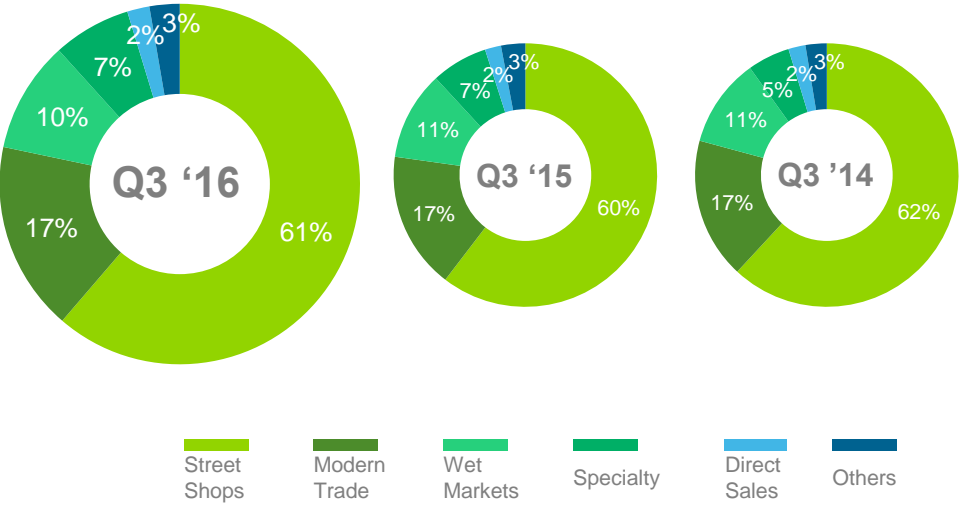
%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

Value	Volume	Penetration
Adult Milk Powder	Bottled Water	Sweetened Condensed Milk
Drinking Yoghurt	Drinking Yoghurt	Biscuits
Tonic Food Drink	Tonic Food Drink	Drinking Yoghurt
Biscuits	Ice Cream	RTD IFT
Bottled Water	Frozen Food	Bottled Water
Frozen Food	Biscuits	Tonic Food Drink
Beer	Liquid Milk	
Fish Sauce	Instant Coffee	
Liquid Milk	Yoghurt	
Sweetened Condensed Milk	Beer	

Channel Importance

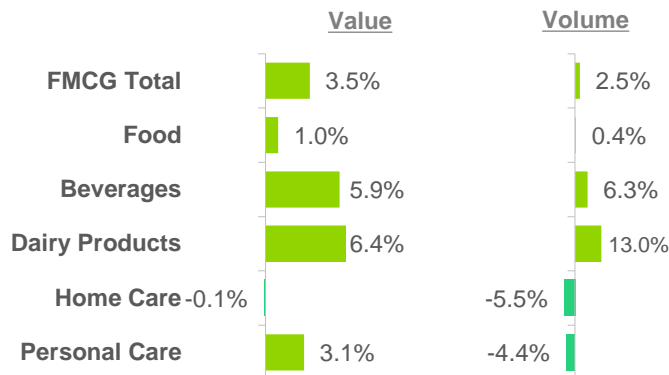


4 Key Cities Only

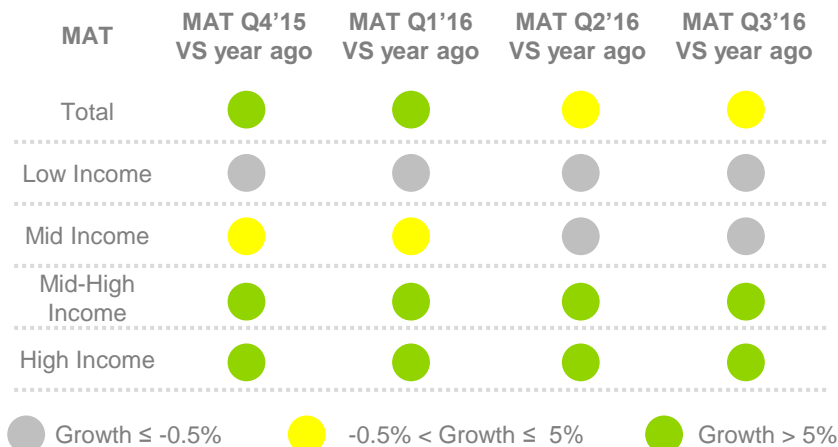


# VIETNAM RURAL

## BASKET TRENDS – Q3'16 vs Q3'15



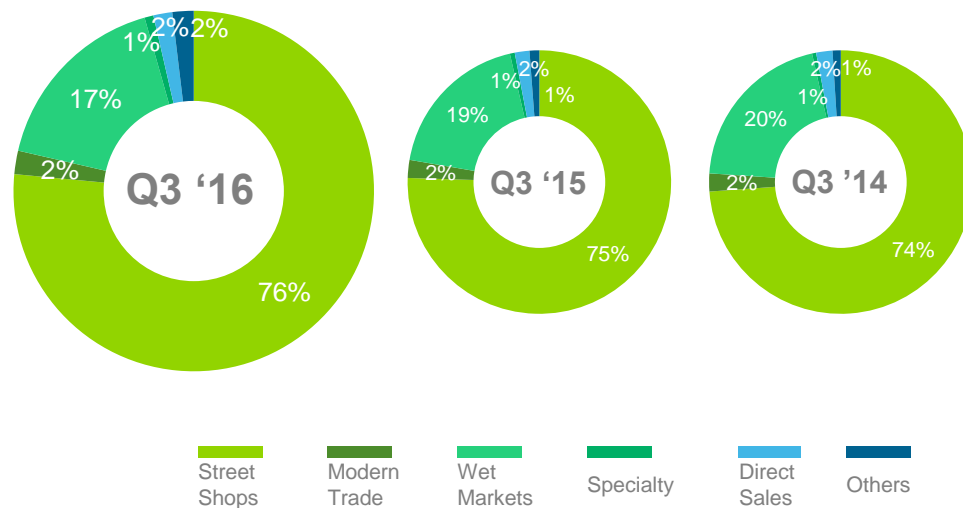
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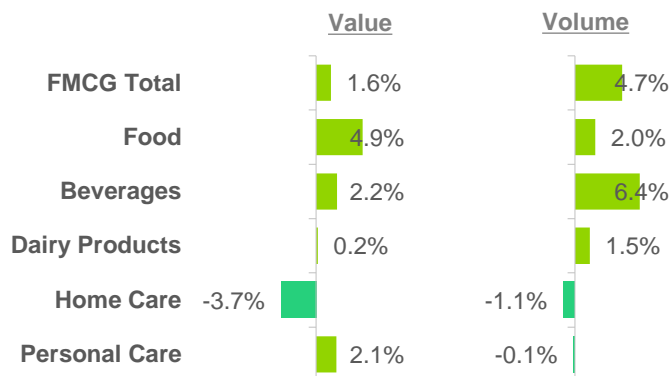
## Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

Value	Volume	Penetration
Tonic Food Drink	Tonic Food Drink	Biscuits
Energy Drink	Drinking Yoghurt	Sweetened Condensed Milk
Biscuits	Energy Drink	Tonic Food Drink
Bottled Water	Bottled Water	Drinking Yoghurt
Sweetened Condensed Milk	Biscuits	Fish Sauce
Instant Coffee	Yoghurts	
Yoghurt	Instant Coffee	
Cakes	Liquid Milk	
Baby Diaper	Cakes	
Liquid Milk	Fabric Softener	

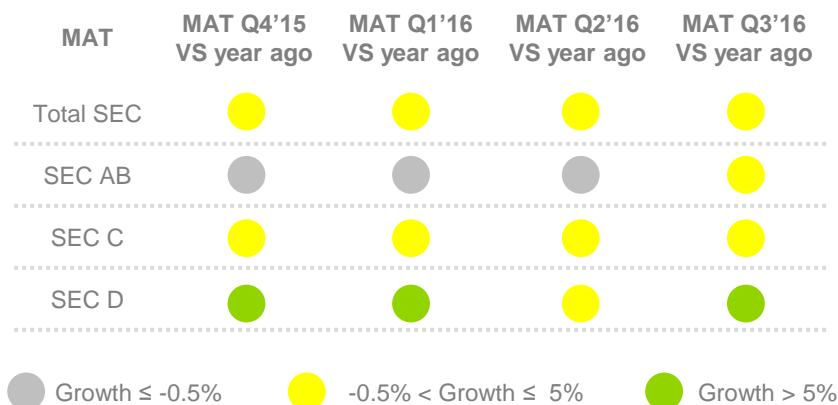
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## BASKET TRENDS – Q3'16 vs Q3'15



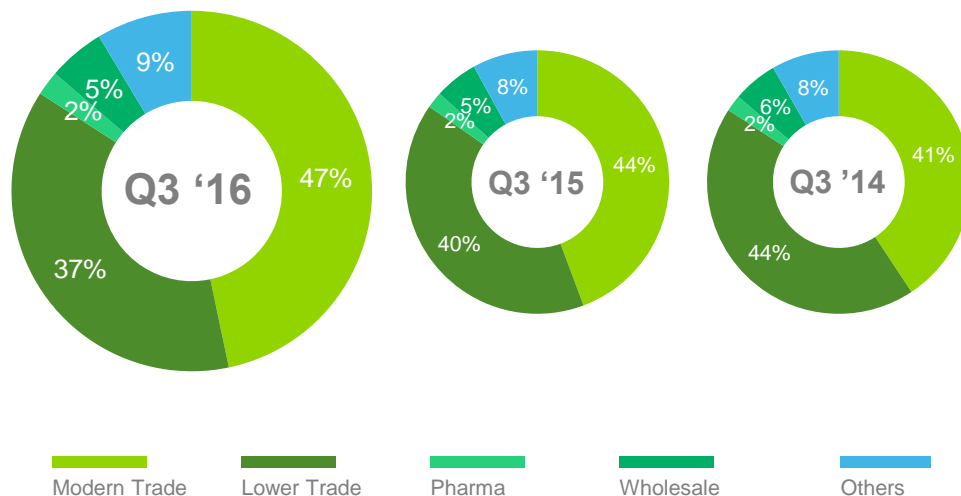
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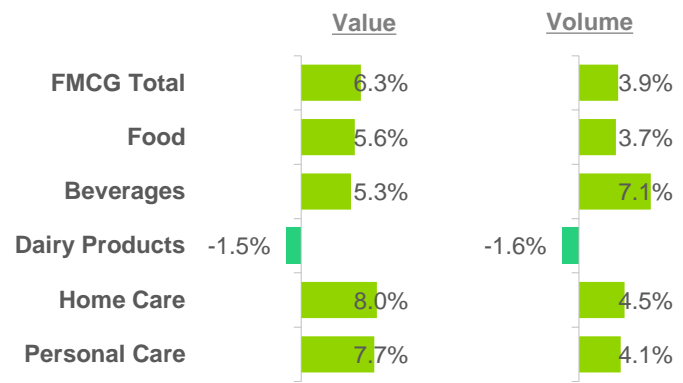
## Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

Value	Volume	Penetration
Sliced/Toast Bread	Dessert Mixes	Spreads
Body Deo	Body Deo	Body Deo
Bottled Water	Sliced/Toast Bread	Cheese
Dessert Mixes	Evaporated Milk	Fresh Milk
Spreads	Bottled Water	Sliced/Toast Bread
Chocolates	Coffee Creamer	Bottled Water
Evaporated Milk	Condensed Milk	Evaporated Milk
Condensed Milk	Sanitary Napkins	Coffee Creamer
Toothpaste	Spreads	Condensed Milk
Toilet Soaps	Labneh	Soups

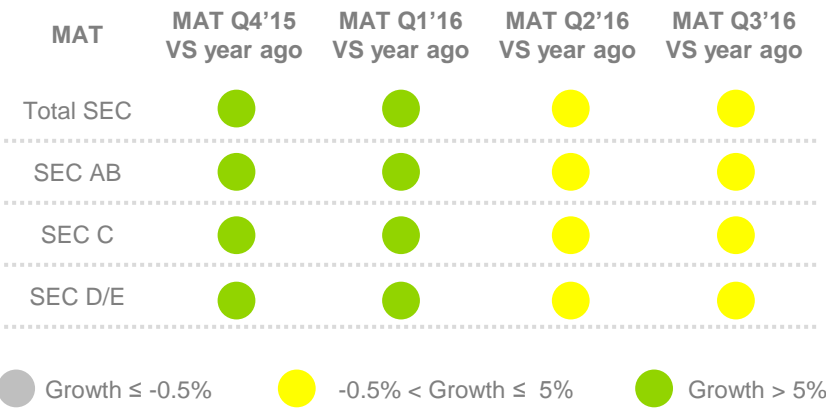
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BASKET TRENDS – Q3'16 vs Q3'15



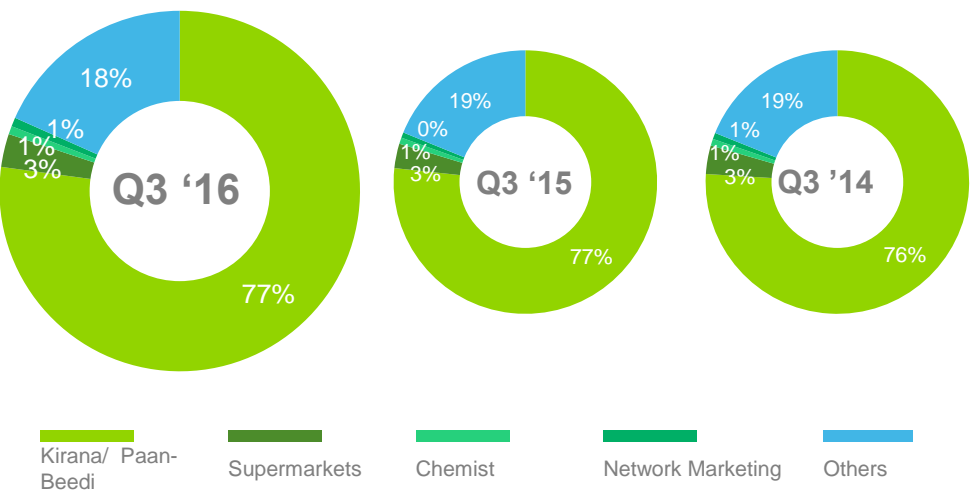
%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



Top 10 Categories with Positive Impact – Q3'16 vs Q3'15

Value	Volume	Penetration
Sauces	Sauces	Toilet/Bathroom Cleaners
Floor Cleaner	Floor Cleaner	Bottled Soft Drink
Toilet/Bathroom Cleaners	Depilatory Product	Floor Cleaner
Depilatory Product	Toilet/Bathroom Cleaner	Sauces
Shampoo	Bottled Soft Drink	Talcum Powder
Rubs/Balms	Rubs/Balms	Rubs/Balms
Bottled Soft Drink	Insecticides	Sanitary Products
Insecticides	Tea	Salty Snacks
Washing Powder	Shaving Blades	Metal Scourers
Hair Oil	Talcum Powder	Coffee

Channel Importance



# KANTAR WORLD PANEL



# KANTAR WORLD PANEL

Thank you